



# James Johnson

Life Insurance Agent

## CONTACT

(713) 555-1234

james.johnson@gmail.com

United States, Houston, TX

## EDUCATION

### Bachelor's Degree in Business Administration

University of Houston, United States,  
Graduated: May 2025

- GPA: 3.7/4.0

### Certifications

- Certified Life Underwriter (CLU)**, *The American College of Financial Services*, December 2023
- Life and Health Insurance License**, - *Texas Department of Insurance*, April 2023

## PROFESSIONAL SUMMARY

Goal-oriented and customer-focused Life Insurance Agent with a strong desire to help clients secure their financial futures. Highly skilled in assessing client needs, presenting tailored policies, and fostering long-term relationships. Adept at using CRM systems to track client interactions and maintain up-to-date records.

## EXPERIENCE

### Life Insurance Agent 2025 - Now State Farm Insurance, Houston, TX

- Work with clients to assess their life insurance needs, providing policy recommendations that align with their financial goals.
- Build and maintain relationships with clients, following up regularly to ensure satisfaction and retention.
- Conduct market research to stay informed on the latest insurance trends and competitors' offerings.
- Process claims, ensuring accurate documentation and timely follow-ups to meet customer expectations.

### Sales Intern 2024 - 2024 Allstate Insurance, Houston, TX

- Assisted senior agents in preparing and presenting life insurance policies to potential clients.
- Managed data entry and administrative tasks in the CRM system to maintain organized client files.
- Gained exposure to sales strategies and customer relationship management while shadowing experienced agents.

## SKILLS

Life insurance sales and policy recommendations ★★★★★

Customer relationship management (CRM) systems (Salesforce) ★★★★★

Market research and competitor analysis ★★★★★

Excellent communication and negotiation skills ★★★★★

Time management and organizational skills ★★★★★